REGISTER NOW!

April 11-13, 2018 • The Vinoy Renaissance, St. Petersburg, Florida

Transitions East

The conference for family businesses by family businesses

THRIVING WITHIN AND OUTSIDE THE FAMILY BUSINESS

Transitions East 2018 will address:

- ‘Whole System’ Family Governance
- Succession Planning: What Works and What Doesn’t
- Women’s Changing Roles in the Family Business
- Why I Joined/Didn’t Join/Left the Family Business
- Managing Conflict to Workable Resolutions

Plus: **Sleep Better!**
A workshop on what keeps family business shareholders awake at night

TO LEARN MORE, AND REGISTER, visit:
www.familybusinessmagazine.com/te18

QUESTIONS ABOUT THE PROGRAM?
Contact Peter Begalla, Conference and Education Director, pbegalla@familybusinessmagazine.com or (386) 785-7856

Family Business
THE GUIDE FOR FAMILY COMPANIES

PRELIMINARY PROGRAM

WEDNESDAY, APRIL 11

2:30-6:30 p.m. Registration

3:30-4:30 p.m. Family Business Basics and Private Business Governance Best Practices

An optional, complimentary pre-conference session for first-time Transitions attendees and others who wish to brush up on key family business terms and practices. A special section has been added on private company governance/board best practices. The session will also offer tips on how to get the most out of the conference experience.

Speakers: *David Karofsky, Consultant, The Family Business Consulting Group; Steven R. Walker, General Counsel & Managing Director, Board Advisory Services, National Association of Corporate Directors; Peter Begalla, Conference and Education Director,* Family Business *Magazine*

4:30-5 p.m. Networking Break

5-6 p.m. 'Whole System' Family Governance

Panelists will describe the various governance bodies and governing documents that are in place in their company, the boundaries and intersections of each part of the family/business/ownership system and how the different parts work to ensure smooth functioning throughout the system.

Speakers: *Kent Lundberg, Director, Lundberg Family Farms; John Reininger, Chief Relationship Officer, The Clemens Family Corporation; Tamara Smith, Chair, Smith Family Council*

Moderator: *Charlie Carr, Managing Director, Family Enterprise Advisory Services, PwC*

6-6:30 p.m. Opening Keynote Conversation

Speaker: *Susan Marvin, Chair of the Board, The Marvin Companies*

Interviewed by *Jonathan Flack, U.S. Family Business Services Leader, PwC*

6:30-9 p.m. Welcome Reception and Dinner

THURSDAY, APRIL 12

7:30 a.m.-4:30 p.m. Registration Open

7:30-8:30 a.m. Breakfast

8:30-9:30 a.m. Succession Planning: What Works and What Doesn't

A deep dive into the best practices for preparing and updating your succession plan. What should be the philosophical underpinnings of your plan? Have you set the tone for stewardship across your family and business? How do you start the process? Are you able to deal with unexpected leadership changes due to death or disability? As you think through succession, are you casting a wide enough net? Panelists will discuss their experiences in addressing these issues.

Speakers: *Ross Born, Co-CEO, Just Born Quality Confections; Daniel Ariens, Chairman and CEO, Ariens Company; Letitia Hussey Beauregard, Chair of the Board of Directors, Hussey Seating Company*

Moderator: *Bryant W. Seaman III, Managing Director and Head of Private Asset Advisory, Bessemer Trust*

9:30-10 a.m. Networking Break

10-11 a.m. Women's Changing Roles in the Family Business

Thirty years ago, few women were seriously considered for key roles in their family or business — decisions were likely made by an authoritarian patriarch. Now, women are increasingly given room to step up. Our panel will discuss what has changed, and what still needs to change.

Speakers: *Barbara Moran-Goodrich, Co-Founder, Chairwoman, CEO, Moran Family of Brands; Michelle Clements, President, Synergy Trust Company; Laura M. Neiman, President & CEO, Neiman Brothers Company Inc.*

Moderator: *Rhona Vogel, Founder and CEO, Vogel Consulting*

11-11:15 a.m. Networking Break

11:15 a.m.-12:15 p.m. Expert Briefings

- Philanthropy — Creating a Family Legacy and Building Family Engagement: *Kate Coughlin, Kellogg Center for Family Enterprises*
- The Non-Family Executive and Family Relationships: *F. Douglas Raymond, Drinker Biddle & Reath LLP*
- Marrying In and Dealing with Family Conflict: *Blair Trippe, Continuity Family Business Consulting*
- Family History: Your Past as a Bridge to Planning Your Future: *Jill Shipley and Mark Speltz, Abbot Downing*
- How to Keep the Family Business in the Family: *Mike Pinkans and Greg Stevens, Capital Formation Counselors*
- Financial Readiness for Women: *Diane K. Doolin, Morgan Stanley*
- How Should NextGen Family Members Prepare for Future Family Leadership? *Charlie Adams, PwC*
- Choosing or Changing a Family Wealth Adviser: *Lynn Erskine and Erich Hickey, Drexel Morgan Capital Advisers*

12:15-12:30 p.m. Networking Break

12:30-1:45 p.m. Lunch

1:45-2 p.m. Networking Break

2-2:45 p.m. Workshop: What Keeps Family Business Members Awake at Night?

A solutions-oriented workshop centering on the key family issues that attendees face, based on feedback from our pre-conference survey. In this working session, we'll discuss potential solutions and outcomes. Sleep a little better!

Session Leaders: *Michael Fassler, Principal Consultant, and David Karofsky, Consultant, The Family Business Consulting Group*

2:45-3 p.m. Networking Break

3-4 p.m. Why I Joined, Didn't Join or Left the Family Business

NextGen members discuss the reasoning behind their decision to either join or not join the family business, or why they left the business after working there for a while. What can families do to increase NextGen engagement with the family business?

Speakers: *Howard Holmes II, Regional Business Manager, Chelsea Milling; Travis York, President & CEO, GYK Antler; Steve Napoli, Owner/Operator of SnapTop; Former Assistant Product Purchasing & Development Director for Idylwilde Farm*

Moderator: *Jill Shipley, Managing Director, Abbot Downing*

4-5 p.m. Intensive Workshops *(select one)*

Building the Best Family Meeting

This session will focus on great family meeting ideas and planning processes that promote engagement across the generations. Attendees will come away with a framework to plan and deliver family meetings that are fun and will promote clarity and cohesion across the whole family.

Session Leaders: *Nancy Drozdow, Founder/Principal and Debbie Bing, President, CFAR*

Creating a Family Development Plan

Family members can play many roles: as shareholders,

CONFERENCE REGISTRATION RATES

Standard Pricing

$1,875: First attendee from your family company

$1,375: Each additional attendee (age 30+)

$1,150: Each additional Next Generation attendee (age 29 and under)

Members of families who have previously attended a Transitions conference receive a 10% discount on their cost of attendance. Your registration also includes a one-year subscription to Family Business *Magazine or a one-year extension to your current subscription.*

For general questions on attendance or help with registration, please contact **Justine Wood** at **(703) 850-5497** or **jwood@familybusinessmagazine.com.** All attendees will be verified prior to acceptance of registration. A family company's advisers may attend only if accompanied by one or more family company members. Other family company advisers may contact **Mike Bachman** at **(215) 405-6070** for information on attending.

or working in the business at various levels, or participating in family or business governance, or other roles — and they all could use help in growing as effective members of the family and the business. This session will focus on creating plans to develop all family members, regardless of their role(s), and building the components of a systematic education and development program. Sample curricula will be provided, and discussion will focus on building and tracking the results of the family development plan.
Session Leader: *Janice DiPietro, Founder and CEO, Exceptional Leaders International*

Effective Mentoring in the Family Business
Preparing family members for the various roles and responsibilities in a family enterprise can be daunting. From the emerging family executive to the family champion and potential trustees, families must cultivate skills and talents that are rooted in the family values and principles while ensuring the technical competence is in firmly in place. A well-developed mentoring process helps families track and develop family members to steward the enterprise in their generation.
Session Leader: *Andrew L. Busser, Managing Director of Strategy, Pitcairn*

6:30-9 p.m. Family Dinner
Speaker: *Andrew D. Pitcairn, Pitcairn Family Council Chair*

FRIDAY, APRIL 13

7:30-8:30 a.m. Breakfast

8:35-9:35 a.m. Expert Briefings
Repeats sessions from Thursday

9:35-10 a.m. Networking Break

10-11:15 a.m. Managing Conflict to Workable Resolutions
Sometimes, conflict within a family business can seem irresolvable. But there are ways to leverage disagreements into stronger family bonds and better businesses. Panelists will discuss their experience with facing and managing complex family and business conflict.
Speakers: *Heath Nunnemacher, Director, Galland Henning Nopak, Inc.; Ralph Brennan, President, Ralph Brennan Restaurant Group*
Moderator: *Daisy Medici, Managing Director of Governance and Education, GenSpring*

11:15 a.m.-12 noon Keynote Interview
Speaker: *Andrew Cathy, Senior Vice President, Chief People Officer, Chick-Fil-A*
Interviewed by *Blair Trippe, Managing Partner, Continuity Family Business Consulting*

12 noon-1:15 p.m. Lunch and Conference Close

FEATURED FAMILY BUSINESS SPEAKERS

(For complete speaker biographies, visit www.familybusinessmagazine.com/te18)


Susan Marvin
Chair of the Board, The Marvin Companies


Andrew Cathy
Senior Vice President, Chief People Officer, Chick-Fil-A

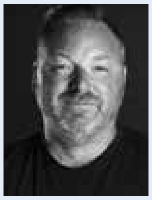

John W. Reininger
Chief Relationship Officer, The Clemens Family Corporation


Barbara Moran-Goodrich
Co-Founder, Chairwoman, CEO, Moran Family of Brands


Letitia Hussey Beauregard
Chair of the Board of Directors, Hussey Seating Company


Kent Lundberg
Chair, Governance Committee, Lundberg Family Farms; CEO, Howard Van Dyke Family Enterprise


Ross J. Born
Co-CEO, Just Born Inc.


Travis York
President & CEO, GYK Antler

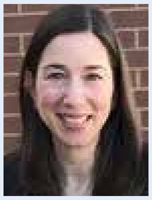

Daniel Ariens
Chairman and CEO, Ariens Company


Heath Nunnemacher
Director, Galland Henning Nopak Inc.


Howard Holmes II
Regional Business Manager, Chelsea Milling Company

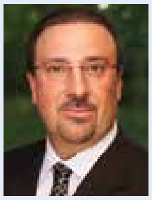

Steve Napoli
Owner/Operator of SnapTop; Former Assistant Product Purchasing & Development Director for Idylwilde Farm


Ralph Brennan
President, Ralph Brennan Restaurant Group


Laura M. Neiman
President & CEO, Neiman Brothers Company Inc.


Tamara Smith
Chair, Smith Family Council, Menasha Corporation


Michelle Clements
President, Synergy Trust Company


Andrew D. Pitcairn
Pitcairn Family Council Chair